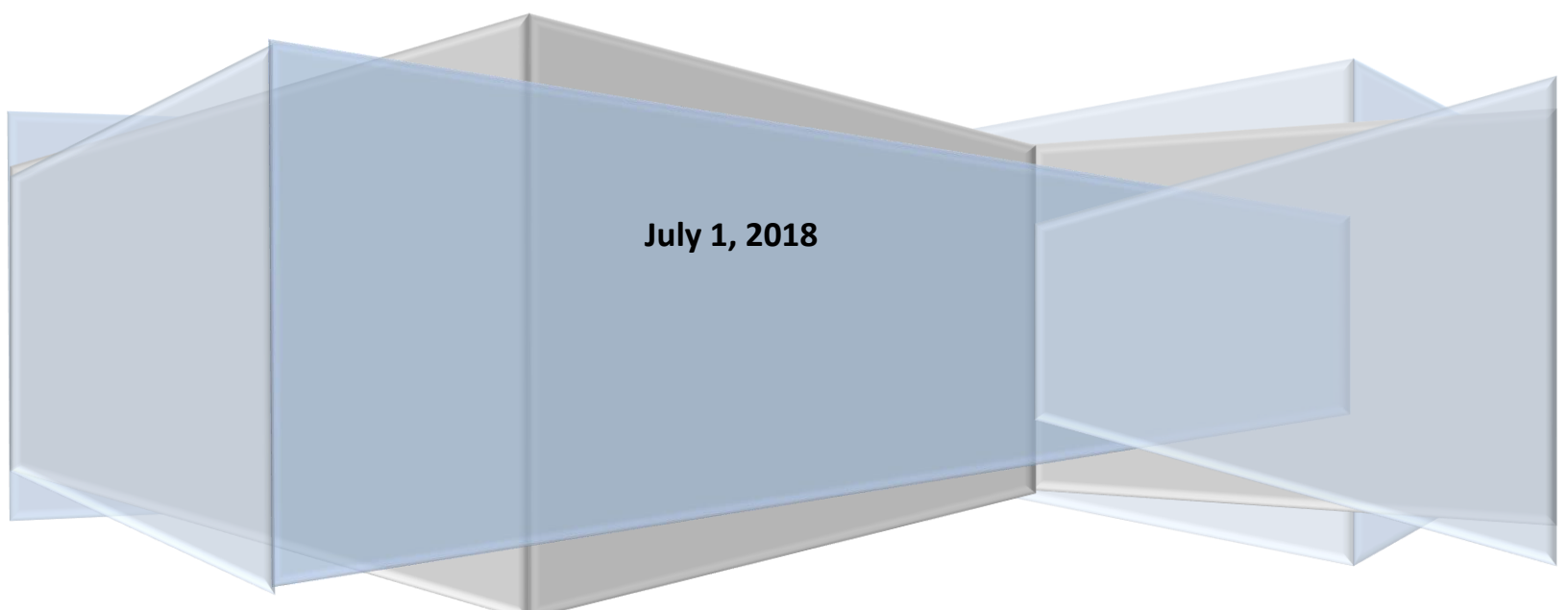


Virginia Department of Health

LISSDEP Monthly Reporting

Low Income Safety Seat Distribution and Education Program

Version 2.0



July 1, 2018

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Document History

Revision History:

Numbering convention: Version. Revision as n.xx. Pre-publication drafts are 0.xx; first published version is 1.00; for minor revisions to a published document, increment the decimal number (ex. 1.01); for major content upgrades to a published document, increment the leading whole number (ex.2.00).

Revision	Date	Description
1.00	8-1-2016	Initial release.
1.001	8-2-2016	Grammar, spelling corrections; password information update.
1.01	8-16-2016	Updated to reflect additional features for the Dashboard and Reports. Updated graphics of LISSDEP web pages. Some text reformatting. Corresponds with software release 1.01.
1.02	8-31-2016	Release 1.02; new report for VDH managers
1.021	9-7-2016	Update Dashboard documentation for tracking form editing functions.
1.022	9-2-2016	Update documentation for new reports.
1.2	10-11-2016	Update documentation for release 1.2.
2.0	7-1-2018	Update documentation for release 2.0

Introduction

The LISSDEP reporting process has changed effective July 1, 2018. The major changes are:

1. Distribution Sites will now report application and application review information by parent/child.
2. Distribution sites will now report specific seat inventory transactions.
3. Distributions sites will now be able to summarize the information (entered above) for their monthly reporting. (Totals for the monthly tracking report are calculated, not entered.)

As a result of now entering specific parent application information, additional features have been added to LISSDEP to better protect this personal/sensitive information. These security-related changes will primarily impact users who do not have email addresses that end with @.vdh.virginia.gov.

IMPORTANT:

LISSDEP can be accessed by individuals who are VDH staff (employees or contractors) and by non-VDH staff.

If you have an email address that ends with @.vdh.virginia.gov, in LISSDEP, you are considered a COV (Commonwealth of Virginia) user. To access LISSDEP, you enter the same VDH email address and password as you use to log on to your computer when you start or restart your computer. If you change your COV password, that new password is used to access LISSDEP.

If you have an email address that does NOT end with @.vdh.virginia.gov, you are considered a Password user, meaning that LISSDEP manages your logon and password. For Password Users, those changes include:

1. User passwords have to be changed every 90 days (this time may soon change to 42 days, based on proposed Commonwealth of Virginia security regulations).
2. Users have the ability to reset their passwords when they expire or at any time (using Forgot Password or Reset Password features).
3. Users are required to set up security questions that are used during “forgot password” process.
4. If a user does not logon for 90 days, their account is deactivated.
5. Users must acknowledge the system access agreement every year (during logon process).

This document provides information for how you can access the electronic reporting system and enter the required information. LISSDEP is accessed via a web browser such as *Internet Explorer, Firefox or Chrome*. The web address for the LISSDEP Reporting system is below. In order to access the reporting system, you will need a user id and password which is obtained through your manager and approved by the VDH LISSDEP office. (Please check with you manager on how to request a LISSDEP account).

LISSDEP Status Definitions

There are five statuses for the monthly tracking form report:

1. DRAFT
 - a. When a new Tracking Form monthly report for a site is created, its status is *Draft*.
 - b. A Tracking Form remains in *Draft* status until all data have been entered, the **Submit** button is clicked and there are no edit errors.
 - c. During the review and approval process, a tracking form can return to the Draft Status if the reviewer finds errors that require corrections by the reporting site
2. SUBMITTED
 - a. When a distribution site has completed work on a tracking form in Draft status (either a new form or form returned by reviewers), they click the Submit button at the bottom of the tracking form and if there are no errors detected, the status is changed from *Draft* to *Submitted*. A message displays indicating the change.
3. LHD APPROVED
 - a. A health district LISSDEP manager is responsible for reviewing all tracking forms submitted by sites in the district(s) for which they have oversight responsibility.
 - b. A health district LISSDEP manager is able to see all tracking forms (for sites for which they are responsible) in a *Submitted* status on the Dashboard.
 - c. A health district LISSDEP manager reviews each site tracking form in *Submitted* status.
 - d. If a site tracking form report is satisfactory, the health district LISSDEP manager approves and the status changes from *Submitted* to *LHD Approved*. If the site tracking form is not satisfactory, it is disapproved and the status changes from *Submitted* to *Draft* (and the site is again responsible for editing and re-submitting).
4. STATE REVIEW
 - a. VDH LISSDEP managers are responsible for reviewing tracking forms approved by all health district LISSDEP managers in the state.
 - b. A VDH LISSDEP manager is able to see all tracking forms in a *LHD Approved* status on their Dashboard.
 - c. A VDH LISSDEP manager reviews monthly tracking forms in *LHD Approved* status.
 - d. If site tracking form is satisfactory, the VDH LISSDEP manager approves and the status changes from *LHD Approved* to *State Approved*. If tracking form is not approved, the VDH LISSDEP manager determines the nature of the problem and may change the status from *LHD Approved* to *State Review* or *LHD Approved* to *Draft*. Tracking Forms on *State Review* may subsequently be changed from *State Review* to *State Approved* or *Draft*. (Tracking forms on *Draft* status become the site's responsibility for editing and re-submitting.)
5. STATE APPROVED
 - a. *State Approved* is the *final* status for each site's monthly tracking form.
 - b. A site may not begin work on a new month's tracking form until the prior month's form has a status of *State Approved*.

How to Obtain a User Account to Access LISSDEP

1. Click here: [Low-Income Safety Seat Distribution and Education Coordinators - Resources and Forms](#)
 - a. Contact Marcia Franchok-Hill for logon information if needed
2. Select LISSDEP Access Request Form.
 - a. Read Page 1 LISSDEP Security Access Agreement with VDH.
 - b. Go to Page 2 and enter the information requested.
 - i. Make sure you provide your full name, job title, phone number, supervisor's name and email. (You email address should be your "work email address", not a personal email address.)
 - ii. Make sure you designate your Program Site Name(s) and Health District.
 - iii. Always check "New User" to establish an account.
 1. Your role should always be *Reporter*.
 - c. Print completed form.
 - d. Print and sign your name (you are USER).
 - e. Submit signed form to your LISSDEP District Coordinator for approval.
3. When request has been fully approved, you will receive information from the VDH Help Desk with your user id and a temporary password.
4. You must logon to the LISSDEP system within 24 hours after receiving the temporary password. During the logon process, you will be required to create a new password.
5. If you have problems completing this form, contact your LISSDEP district coordinator.

Passwords and Password Information (PASSWORD USERS ONLY)

Passwords, along with your user identification provide access to the LISSDEP application. The LISSDEP application has a number of controls related to passwords -- length, complexity and how often they must be changed. Here are some things you should know:

- Password:
 - at least 8 characters long and must use at least 3 of the following attributes:
 - Special characters – like! @ # \$ % ^ & * () .
 - Alphabetical characters
 - Numerical characters
 - Combination of upper case and lower case letters
 - For example: 4ngH0)3kTZ is acceptable; 4ngh03k5 is not acceptable.
- Password must be changed every 90 days; you will receive a notice to change your password prior to expiration; if you attempt to logon and your password has expired, you will be required to change it (by providing your old password and a new one, entered twice for confirmation).
- Passwords cannot be reused for 24 changes.
- When your account is first established, you will receive a temporary password. At the time you first logon to LISSDEP, you will be required to change your password. The temporary password must be changed within 24 hours of receipt. If the temporary password expires, contact the VDH Help Desk at 804/864-7200, Option 2.
- You have 3 attempts to correctly enter your password at login. If you enter it incorrectly, you will receive an error message (always check your user id to make sure it is entered correctly!) After the third attempt, you logon account will be temporarily locked for 15 minutes.
- You may only change your password one time in a 24 hour period.
- As you know, you should never share a password with anyone. If you have reason to believe that someone may know your password, change it immediately.
- Contact the VDH Help Desk for assistance at 804/864-7200, Option 2.

If you are a COV user (have a “vdh.virginia.gov” email address), contact the VCCC (866-637-8482) to resolve password problems

LISSDEP Security Questions (PASSWORD USERS ONLY)

Starting July 1, 2018, all external LISSDEP users (users with email addresses the do NOT end with @vdh.virginia.gov) must select 3 security questions and provide answers to those questions. Users will be prompted to answer these questions during the logon process. The user will be required to provide answers to one (or more) of these questions for password changes.

If you cannot remember answers to your security question, contact the VDH Help Desk. The Help Desk will reset your account and you will have to select new security questions (and answer) when you next logon to LISSDEP.

Hint: the best answer to security questions are answers that are not accurate (not truthful). These are the best answers as long as you can remember them. Accurate answers are easier to remember but someone who knows you can more easily guess the answers.

LISSDEP ACCESS AGREEMENTS (PASSWORD USERS ONLY)

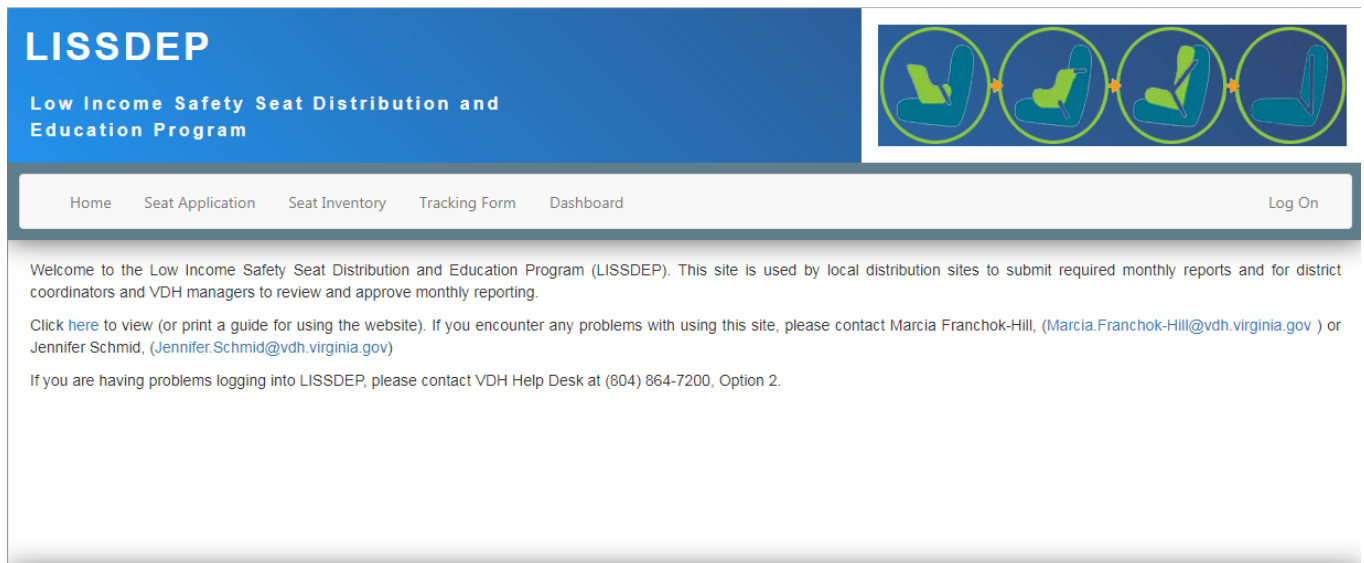
All LISSDEP users are required to accept a user access agreement at the time they are granted access to LISSDEP and annually thereafter. Each year, the LISSDEP Access Agreement document is displayed to Password users during the logon process the must be accepted by the user. (COV users provide this acceptance as a part of their annual security training requirement.)

Monthly Reporting and Recommended Process for Distribution Sites

1. When your LISSDEP monthly tracking report for the month has been “State Approved” (email received), create a draft tracking report for the current month.
2. Enter (into LISSDEP) the seat application and application review information on a daily basis (when applications occur)
3. Enter (into LISSDEP) the seat inventory transactions on a daily basis (when they occur).
4. Enter (into LISSDEP) training classes and promotional events (when they occur)
5. On or about the end of the month (or any time during the month):
 - a. Perform the **LISSDEP Calculate/Recalculate Form Totals** process.
 - b. Review the summarized data.
 - c. Determine if there are missing/inaccurate detail data entered.
 - i. Go to the Application and Seat inventory web pages and correct/enter as needed.
 - d. Repeat this process as many times as needed until all monthly detail data have been entered and the data verified.
 - i. Ending inventory should equal the number of each seat type on hand at the end of the month (physical inventory).
 - ii. Type of instruction provided should match what actually occurred.
 - iii. Missed training, waiting list and reasons applications denied should equal what actually occurred.
 - iv. Training classes and Promotional events should reflect what actually occurred.
6. When the summarized data have been verified:
 - a. Certify the ending inventory on the tracking report (with physical inventory) on Inventory Summary section of tracking Form.
 - b. Provide Name of VDH approved agency serving as Safety Seat Check Station and Refer to Website on Instructional Summary section of Tracking Form
 - c. Perform **Submit Tracking Form**.
7. After monthly tracking form is submitted:
 - a. The District Coordinator reviews and approves (or denies).
 - b. The VDH LISSDEP office reviews and approved (or denies).
 - c. Respond to any question/issues about the tracking form submitted from the District Coordinator or the VDH LISSDEP office. (This may involve having to change the data you reported and resubmitting.
8. When submitted tracking form status is STATE APPROVED, the process is complete.

How to Access the LISSDEP Website

1. To access the monthly electronic reporting form, open you web browser and enter www.vdh.virginia.gov/LISSDEP as the web address. (You may want to bookmark this, too.)
2. The following page will display:



How to Log On to LISSDEP

1. Click Log On (upper right of page)
2. The Log in Form will display:

Log in Form

User name

Password

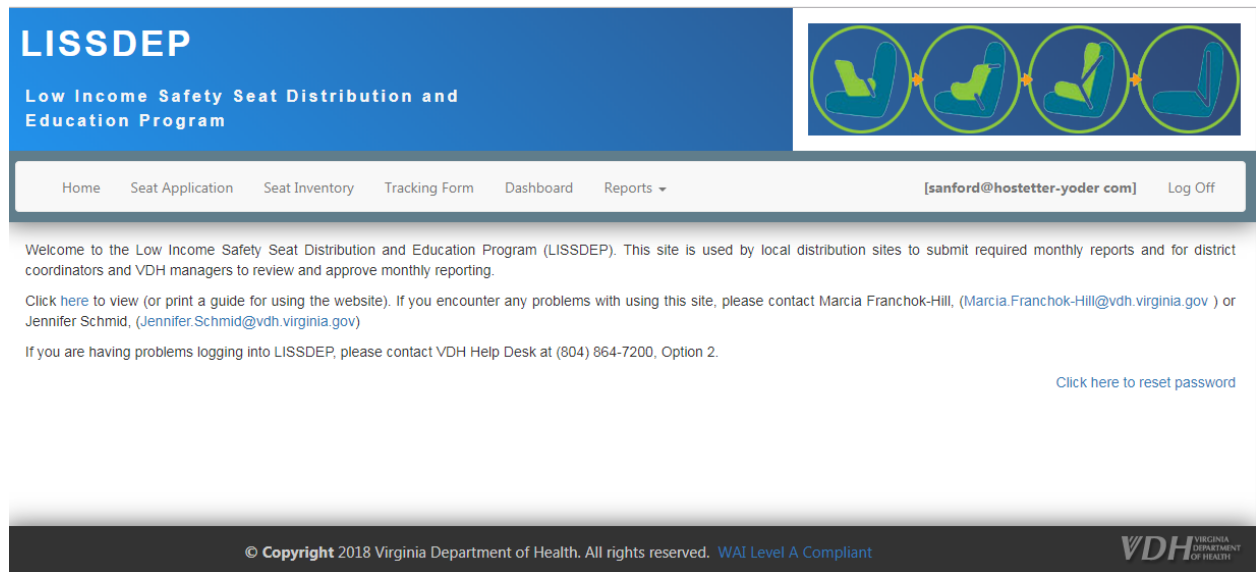
☐ This computer system is the property of the Commonwealth of Virginia and is intended for use by authorized individuals only. By accessing and using this system, you are consenting to system monitoring for law enforcement and other purposes. Unauthorized use of this system may subject you to State or Federal criminal prosecution and penalties.

[Forgot Password](#) [Log in](#)

3. Enter your assigned user id and password; click on Log in to access the electronic reporting form. This is your VDH email address and related password.
4. Click on check box to acknowledge the statement. (A check mark ☒ will display.) Note: you cannot log on to LISSDEP unless you there is a check mark ☒ in this box.
5. Click on Log in.
6. For Password users only:
 - a. If you cannot remember your password, click on Forgot Password. You will be requested to enter your email address. If valid, you will receive an email with a link to for setting a new password. You will be required to provide an answer to one of your security questions.

The LISSDEP Home Page

1. After logging on, the LISSDEP Home page displays:



There are 7 functions available on the Home Page:

- **Home** is the Home Page listed above. There is a link for a reference guide and critical contact information. There is also a Reset Password link
- **Seat Applications** – Access to multiple web pages that allow entry/update of safety seat application information for current reporting month and the ability to review statewide safety seat application information (starting 7/1/2018).
- **Seat Inventory** – Access to web page that permits the entry/update of seat inventory information for current reporting month and the ability to review site inventory transactions (starting 7/1/2018).
- **Tracking Form** – this is where you can summarize detail data for current reporting month, view summarized reporting month data (Inventory, Demographic, Instructional Application), enter/update current reporting month training classes, enter/update current reporting month promotional events and submit draft monthly tracking report. You may also view all tracking reports for the a distribution site (with detail starting 7/1/2018).
- **Dashboard** – This is where you can find:
 - The *Draft(s)* of monthly tracking form(s) for your site(s) – these are the Tracking Form(s) “Saved”.
 - The *Submitted* monthly tracking form(s) for you site(s). These are tracking forms awaiting your district coordinator’s approval.
 - The *LHD Approved* tracking form(s) for your site(s).
 - The monthly tracking forms that are either *State Approved* (closed) or in *State Review*.
- **Reports** – provides a mechanism to create a summary report of safety seat data submitted. Filters are available to specify time periods and distribution site(s).
- **Logoff** – This ends your LISSDEP session.

Your ***user id*** also is displayed on the home page.

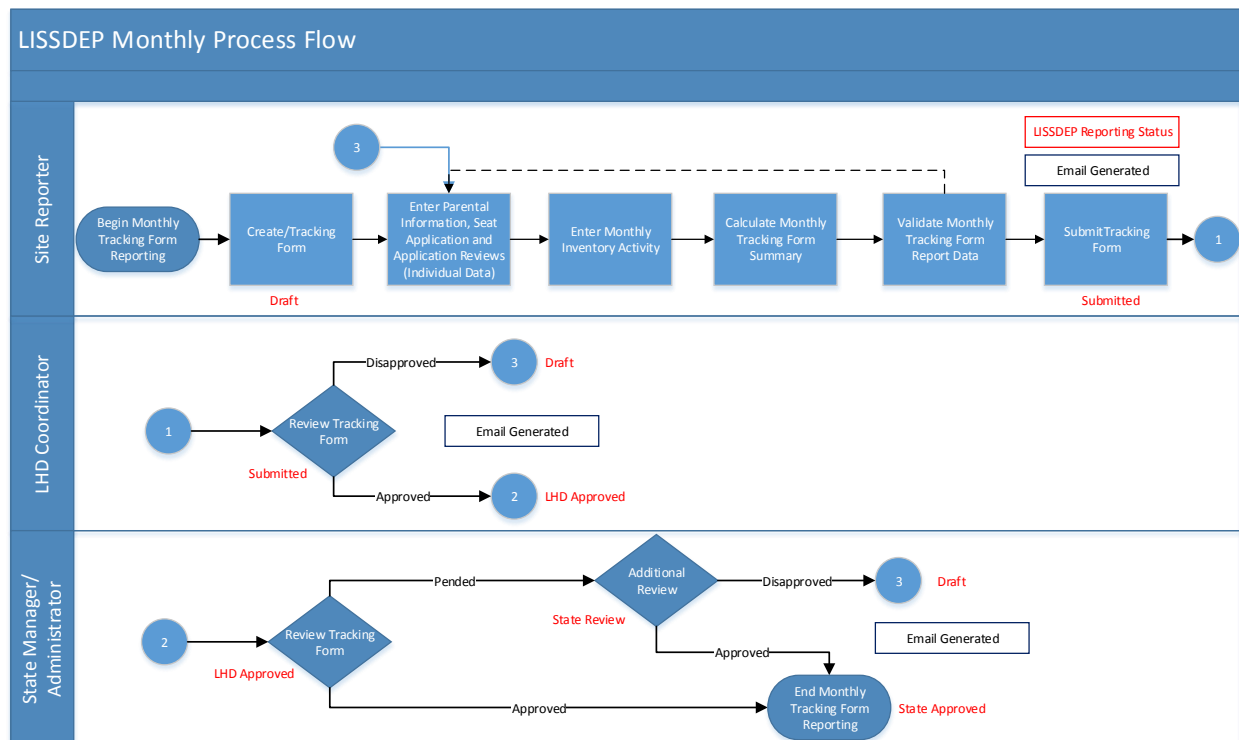
For Password users only , there is also a link to [reset password](#). If you click, you will be requested to enter your old password, then a new password (2 times).

Detail information for each of the LISSDEP functions are provided in the manual.

The LISSDEP Reporting Process

Monthly reporting is performed by each distribution site. The reporting month goes from the first day of the month to the last day of the month. Monthly reports are due in Central Office by the 10th working day of the [next] month. Each time an electronic monthly report is submitted, approved or disapproved, an email is generated to all related parties indicating the changed status. Only one monthly report may be in progress at any time; a distribution center may not begin work on the next month's report until the prior month's report has been fully approved.

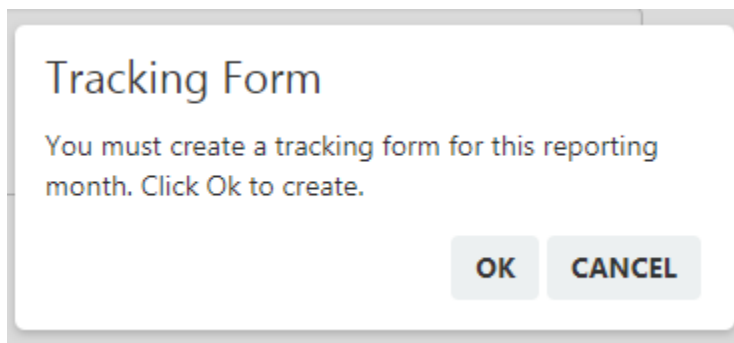
The LISSDEP reporting process is summarized below.



Create Tracking Form (Create Draft Monthly Tracking Form)

At the beginning of each reporting month, a distribution site user must create a draft monthly tracking forms before other monthly reporting activities can be performed. A draft monthly tracking form can be created only after the monthly tracking form from the prior month has been "State Approved). After receiving an email indicating prior month's tracking report was "State Approved". To create a new monthly tracking form:

1. Logon to LISSDEP
2. Click on Tracking Form tab.
3. The Tracking Form web page displays.
4. A message displays indicating a tracking form for the current reporting month must be created:



5. Click OK to create a new tracking from (draft status).
6. A message will appear indicating a new tracking form was created.
7. You may now add seat applications and inventory transactions.

This activity is performed only one time per reporting month.

Safety Seat Applications

There are 6 web pages related to seat applications:

- **Find Parent Guardian** – Search the LISSDEP database for the parent/guardian who submits the safety seat application; display possible matches.
- **Parent/Guardian Information** – provide address, telephone, residency information of the parent/guardian who submits the safety seat application.
- **Related Parent/Guardian Information** – provide information about person(s) related to parent/guardian who submits safety seat application.
- **Safety Seat Application Dashboard** – displays parent/guardian safety seat application(s)
- **Safety Seat Application** – detail for a specific safety seat application
- **Application Review** – detail for safety seat application actions (eligible, not eligible and actions).

Safety Seat Application General Information

1. The LISSDEP parent/guardian database is shared by all distribution sites statewide.
2. A parent/guardian record is considered unique based on Last 4 digits of Social Security Number (SSN), Date of Birth, Last Name and First Name. An additional suffix may be added to the last 4 digits of the SSN to make a record unique when there are duplicates otherwise.
3. Each time an application is made, the user must first search the database for possible parent/guardian matches. If no matches are found, the user may add a new record.
4. Each unique parent/guardian record is linked to all safety seat applications made by that parent regardless of the distribution site.
5. There are no parent/guardian records or related safety seat applications prior to July 1, 2018.
6. If a parent/guardian has made an application at one distribution site during a reporting month, no other distribution site may open an application for that parent/guardian in the same month.

IMPORTANT: LISSDEP is set up to provide the distribution sites with information about parent/guardians (and related parent/guardians) who have made previous safety seat applications. The system will not prevent a user from creating a new parent/guardian record even if there is a possible existing match in the database. Each site is responsible for carefully searching and reviewing the information the system provides before creating a new parent/guardian record. For every new parent/guardian record created, the user should always “related parent/guardian” record, at a with spousal information. There are issues with parents going to multiple sites attempting to obtain safety seats for the same child.

Find/Create Parent Guardian Record

All safety seat application activity starts with a required search of the Parent/Guardian database to determine if a [likely] parent/guardian (or related parent/guardian) record already exists and if there

Is related safety seat activity. After logon, click the Seat application tab at the top of the page and the following page will appear:

Find Primary Parent/Guardian Record

ID No.:
or
Last 4 SSN:
Suffix:

Birth Date:

First Name:
Middle:
Last Name:

Enter ID No. (if known) or Last 4 of SSN/Suffix and Birthdate for fastest and most reliable search. Use name only if Last 4 SSN and Birthdate not sufficient.

Find
Clear

Possible matches:

ID	Last 4 SSN	Suffix	Birthdate	First Name	Middle	Last Name	Type*	# Applications	View/Edit	Application
<p>*Pri = Primary Rel = Related</p> <p>Note: Distribution sites should always carefully review data before using parent/guardian records with multiple relationships.</p> <div>Create New Parent/Guardian Record</div> <p>You must enter Last4SSN, Birthdate, First Name and Last Name to create a new parent/guardian record.</p>										

1. **ID No:** - to find a record by unique ID number. Enter the number and click Find. This is find and display only one record that matches the value entered.

Or Enter

2. **Last 4 SSN** – must be four digits only
3. **Suffix** – must be digits only
4. **Birth Date** – select or enter valid date as mm/dd/yyyy
5. **First Name** – First Name (may enter one or more letters)
6. **Middle** – optional
7. **Last Name** – Last Name (may enter one or more letters)
8. **Click Find**

Suggested Search:

1. Enter Last 4 SSN and Birthdate (only).
2. Click **Find**.
3. Review any information displayed to determine if record matches the parent/guardian needed
 - a. Click **View/Edit** icon to view Parent/Guardian information and Review Related Parent/Guardian record
 - b. If Parent/Guardian record has seat applications, click on **Application** icon and review application record(s)
4. If this is a parent/guardian record that you want to use for the application:

- a. Click the **View/Edit** icon (will take you to Parent/Guardian Information page):
 - i. Update any existing parent/guardian information.
 - ii. Update any Related Parent/Guardian information (don't ignore!!)
 - iii. Click **Seat Application Dashboard**
 1. Add new seat application.
5. If this is NOT a parent/guardian that matches the parent/guardian needed
 - a. Enter the First Name, Middle and Last names.
 - b. Enter a Last4SSN suffix (if needed) to make record unique.
 - c. Click Create New Parent/Guardian Record button (will validate this is a new entry and take you to the Parent/Guardian Information page).
 - i. Enter a new parent/guardian record and click **Save**.
 - ii. Enter one (or more) Related Parent/Guardian records (don't ignore!)
 - iii. **Seat Application Dashboard**
 1. Add new seat application.

>> You may perform other searches such as by Last4 SSN or Birthdate or Last name only (full or partial name search).

>> Also, if another distribution site has an active seat application for the same parent/guardian, you will receive a message that the record is locked and not available for your use or editing (but you may still view). If you are trying to initiate a seat application and another site has it locked, you should do some additional investigation as to why the same parent is making applications to 2 different sites.

Create and Update Primary Parent/Guardian Information

The Primary Parent/Guardian Information page displays when the **View/Edit** button or **Create New Parent/Guardian Record** button is clicked on the **Find Primary Parent/Guardian Record page**. The page will allow updates an existing to an existing parent/guardian record or the addition of a new parent/guardian record when the **Save** button is clicked. The **Delete** button only functions if there are no related safety seat applications for a parent/guardian record. A Related Parent/Guardian record can be added, edited or deleted. Related Parent/Guardian information should be maintained when available.

Primary Parent/Guardian Information

ID No.:	1022	First Name:	Maggie	Middle:	Middle	Last Name:	Farmer
Birth Date:	3/15/2018	Last 4 SSN:	9999	Suffix:	0		

Parent/Guardian Type.:	Mother	Primary Language:	Spanish	Homeless:	<input type="radio"/> Yes <input checked="" type="radio"/> No
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Street Address:	45 Dock Street	Mailing Address:	45 Dock Street
	Address2		MailAddress2
	Address3		MailAddress3
City:	Miona	City:	Miona
State:	Virginia	State:	Virginia
Zipcode:	23322	Zipcode:	23322
<input checked="" type="checkbox"/> Check if Mailing Address is same as Street Address			
Email Address:	Email		
VA Resident:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Student Visa:	<input type="radio"/> Yes <input checked="" type="radio"/> No
		Tourist Visa:	<input type="radio"/> Yes <input checked="" type="radio"/> No
		H1-B Visa:	<input checked="" type="radio"/> Yes <input type="radio"/> No
		Telephone:	<input checked="" type="radio"/> Home 7576749823 <input type="radio"/> Mobile <input type="radio"/> Work

Save

Delete

Seat Application Dashboard

1. The identifying parent/guardian information provided from the from the Find Primary Parent Guardian page is displayed at the top of the page. The ID number is blank for a new records until the Save button is clicked. None of the identifying information may be changed.
2. Select the parent/guardian type, Primary Language and Homeless status.
3. Enter/change the Street address. If mailing address is the same, check the box. If mailing address is different, leave box unchecked and enter mailing address.
4. Check VA Resident and Visa information (yes or no required).
5. Enter telephone number(s) and check type (not required).
6. Click Save to keep (or update record).

7. Add Related Parent/Guardian Information (Step 3 below).
8. Navigate to Seat Application Dashboard (Step 4 below).

Create and Update Related Parent/Guardian Information

The Related Parent/Guardian Information is entered (or displayed) at the bottom of the **Primary Parent/Guardian Information** page.

Related Parent/Guardian Information

First Name:

Middle:



Last Name:

Birth Date:

Last 4 SSN:

Suffix:

Add New Related Parent/Guardian

Last 4 SSN	Suffix	Birthdate	First Name	Middle	Last Name	View/Edit	Delete
2385	0	7/12/1982	Sonny	Z	smith		

- To view or edit any existing parent record click the View/Edit icon.
- To add a new related parent/guardian, provide search information (Last4SSN or Birth Date or both is recommended) and click the **Add New Related Parent/Guardian** button.
- To delete a related parent/guardian record, click the delete icon.

Note: you may not be able to add, edit or delete if there is an active application for another site being processed.

If **View/Edit** button clicked, the **Related Parent/Guardian** web page displays the detail information for the related parent/guardian which can be viewed or edited.

Related Parent/Guardian Information

ID No.: 1034

First Name: Sonny

Middle: Z

Last Name: smith

Birth Date: 7/12/1982

Last 4 SSN: 2385

Suffix: 0

VA Resident: ☒ Yes ☐ No

Student Visa: ☐ Yes ☒ No

Language: English

Homeless: ☐ Yes ☒ No

Tourist Visa: ☐ Yes ☒ No

Relationship to Primary Parent/Guardian: Spouse

H1-B Visa: ☐ Yes ☒ No

Street Address: 85 County Rd.. South

Mailing Address: 85 County Rd.. South

Address2

MailAddress2

Address3

MailAddress3

City: Onley

City: Onley

State: Virginia

Zipcode: 23350

State: Virginia

Zipcode: MailZi

☒ Check if Mailing Address is same as Street Address

Email Address: Email

Telephone: ☐ Home ☒ Mobile 7572698852 ☐ Work

Save

Primary Parent/Guardian Information

To change data, tab to (or click) the field(s) to be changed, change data, and click **Save**. (The **Save** button is only active if the record can be edited.)

Click **Primary Parent/Guardian Information** button to return to that page.

If **Add New Related Parent/Guardian** button is clicked, the **Related Parent/Guardian** web page displays. On this page, you may select any existing parent/guardian records (that meet the search criteria entered on the Parent/Guardian Information page) to add as a related parent/guardian you may create a new related parent/guardian record.

The following existing parent/guardian records match or may match the information you entered for a new related parent guardian. You may use one of these existing records if it a valid relationship. ***Distribution sites should always carefully review data before using parent/guardian records with multiple relationships.***

ID ▲	Last 4 SSN ▼	Suffix ▼	Birthdate ▼	First Name ▼	Middle ▼	Last Name ▼	Type ▼	Seat Appls? ▼	Use This Record
1019	9999	0	01/18/1986	Malinda	S	Sanchez	Pri	No	Use this Record
1020	9999	0	04/25/1998	Dawn		Young	Pri	No	Use this Record
1021	9999	0	12/15/1987	Jane		Jones	Pri	No	Use this Record
1022	9999	0	03/15/2018	Maggie		Farmer	Pri	No	Use this Record

Showing 1 to 4 of 4 entries

Previous 1 Next

Add New

- Determine if any of the displayed records are the related parent guardian you want to use. Caution: if a records already exist for a related parent or guardian, you should do additional checking before using – this is a flag for possible fraudulent activity.
 - If ok, click **Use this Record** and the detail information will display below
 - If, after clicking **Use this Record** and viewing the data, you decide this is not the record you want to use, simply click **Use this Record** for another record or click **Add New**. ([This technique is a way of reviewing possible matches.](#))
 - If none of the records displayed is the related parent/guardian, click **Add New**.

Related Parent/Guardian Information

ID No.: First Name: Middle: Last Name:

Birth Date: Last 4 SSN: Suffix:

VA Resident: ☐ Yes ☐ No Student Visa: ☐ Yes ☐ No Language:

Homeless: ☐ Yes ☐ No Tourist Visa: ☐ Yes ☐ No Relationship to Primary Parent/Guardian:

H1-B Visa: ☐ Yes ☐ No

Street Address:

Mailing Address:

City: City:

State: Zipcode: State: Zipcode:

☐ Check if Mailing Address is same as Street Address

Email Address:

Telephone: ☐ Home
☐ Mobile
☐ Work

- If **Use this Record** Clicked,
 - Change any of the data displayed (identifying information may not be changed)
 - Click **Save**.
- If Add New clicked:
 - Select VA Resident (Required)
 - Select Visa information (Required)
 - Select Language (Default is English)
 - Select Relationship to Primary Parent/Guardian (Required)
 - Enter Street Address
 - If Mailing Address is same as Street Address check box
 - If box not checked, enter Mailing Address
 - Enter email address (Optional)
 - Enter Telephone and type (optional)
 - Click **Save**.
- Click Primary Parent/Guardian Information to return to that page.
 - When Parent/Guardian Information page displays, the new related parent/guardian record will display.

Create and Update Safety Seat Applications

Seat Application Dashboard

- The **Seat Application Dashboard** displays when the **Applications** button is clicked on the **Find Primary Parent Guardian** page or **Seat Application** button on the **Primary Parent/Guardian Information** page
- The **Application Dashboard** shows all seat applications (summary) for the primary parent/guardian selected. If a parent/guardian has no applications, a new application can be created.
- The Seat Application Dashboard permits access to the Seat Application page where existing applications may be viewed/edited or new applications created.

Seat Applications For Primary Parent/Guardian

The following safety seat applications are on file for this parent in the state of Virginia. You may view all applications but only change active applications for your site. If there are no applications for this parent/guardian (at any site) during the current reporting month, a new safety seat application may be entered. If there are multiple children, one application must be made for each child. Click edit to work on an existing application.

Distribution Site	Application Date	Status	Seat Type	Child's Name	DOB/Due Date	Decision	View	Edit
Atlantic Com Health Ctr	03/13/2018	Closed	Booster	Juan Sanchez	02/25/2016	Eligible		

Showing 1 to 1 of 1 entries

Previous

1

Next

[New Safety Seat Application](#)

If there are safety seat applications listed :

1. If the LISSDEP user is not from the distribution site who created the application
 - a. The **View** button is active
 - b. The application and application review data may be viewed only
2. If the user is from the distribution site that created the seat application **AND** the seat application date is during the distribution site's current reporting month **OR** the status of the application is pending
 - a. The **Edit** button is active.
 - b. The user may edit the application and application review information.
3. If the user is from the distribution site that created the seat application and the seat application date is prior to the distribution site's current reporting month and the application status is closed
 - a. The **View** button is active
 - b. The application and application review data may be viewed only
 - i. Except if the application was for an "Unborn Child"
 1. The distribution site may add a child name and date of birth if desired.

If there no seat applications listed

1. The **New Safety Seat Application** button is active
2. A new application and application review may be added for that parent/guardian

If there are safety seat applications listed but all are closed and from a prior month

1. The **New Safety Seat Application** button is active

2. A new application and application review may be added for that parent/guardian

If there are safety seats listed and a site has created the an application for the parent guardian during their current reporting month

1. The ***New Safety Seat Application*** button is active
2. A additional application and application review may be added for that parent/guardian (i.e. multiple births or multiple eligible children).

Seat Applications

The seat application display parent/guardian information and distribution site when the page opens.

Primary Parent/Guardian Record

ID No.:	1032	First Name:	Sandy	Middle:	Middle	Last Name:	Smith
Birth Date:	6/29/1988	Last 4 SSN:	0876	Suffix:	1555		
VA Resident:		<input checked="" type="radio"/> Yes <input type="radio"/> No		Student Visa:		<input type="radio"/> Yes <input checked="" type="radio"/> No	
				Tourist Visa:		<input type="radio"/> Yes <input checked="" type="radio"/> No	
		H1-B Visa:		<input type="radio"/> Yes <input checked="" type="radio"/> No			
Distribution Site:		Atlantic Com Health Ctr ▼		Health District:		Eastern Shore - 1	

The Seat application information displays (for existing applications) or is available for entry (new application). Existing applications may be edited as described above. Otherwise, the data presented is “view only”.

Seat Application General Information

Seat Application		Application No.: <input type="text" value="Application 1"/>	Application Status: <input type="text" value="Application 1"/>
Application Date.: <input type="text" value="Application Date"/>	City/Country: <input type="text" value="Select City/Country"/>	District Resident: <input type="radio"/> Yes <input type="radio"/> No	
Application Type.: <input type="text" value="Select Application"/>	Reissue Justification Statement: <input type="text"/>		

1. **Application No.** - assigned by the system when an application is saved.
2. **Application Status** - Assigned by the system. It is *Pending* when until there a final action on the Application Review page – either a seat is issued (eligible application) or applicant is not eligible for a seat. Otherwise, the application status is *Closed*.
3. There are some actions the system automatically may take at the time the Seat Application page opens based on parent/guardian information:
 - a. If parent/guardian is not a resident of Virginia or if any of the visa statuses are set to yes, the parent/guardian is not eligible for a safety seat
 - i. The user must enter an application date and click **Save**.
 - ii. When the **Save** button is clicked, the application is closed and a Not Eligible record automatically created (reason is *Not VA resident or Visa related*).
4. **Application Date** – date parent made application (required)
5. **City County** – pick from dropdown (required)
6. **District Resident** – Yes/No (required)
 - a. If no, the user is instructed to **Save** the Application.
 - b. When the **Save** button is clicked, the application is closed and a Not Eligible record created is automatically created (reason is *Not a resident of the district site*).
7. **Application Type** -select *New* or *Reissue* (Required)
8. **Reissue Justification** – must be provided if Application Type is Reissue.

Requesting Seat For:

Requesting Seat for:

☐ **Unborn Child**

Due Date:

Update Unborn Child Name: Update Unborn Child Birthdate:

☐ **My Child**

First Name: Middle: Last Name:

Birth Date: Age: Weight:

Height Ft.: Height In.:

Medical Condition:

Custody: Court Documentation Description:

- User must indicate if seat is for Unborn Child or for My Child.
- If **Unborn Child**
 - **Due Date** – select date (required)
 - Site may enter **Unborn Child Name/UnbornChild Birthdate** after child is born.
- If **My Child** is Selected
 - **First Name, Middle, Last Name** – enter values (First Name, Last Name required).
 - **Birthdate** – enter or select as mm/dd/yyyy (required)
 - **Age** – value is automatically calculated and displayed
 - **Weight**– enter as whole number (optional)
 - **Height/Feet** – enter a whole number (optional)
 - **Height/inches** – enter as a whole number (optional)
 - **Medical Conditions** – enter text (optional)
 - **Custody** – select custody type from dropdown (optional)
 - **Court Documentation Description** – Enter text (optional)

Demographic, Benefits and Application Finalization Information

The screenshot shows a web form for LISSDEP 2.0. At the top, there are dropdown menus for 'Relationship to Child' (labeled 'Select Relation To') and 'Race' (labeled 'Select Races'), and a text field for 'Other'. Below these are dropdowns for 'Ethnicity' (labeled 'Select Ethnicity'). A section titled 'I or my child receives:' contains checkboxes and text boxes for 'FAMIS', 'WIC', 'MEDICAID', 'TANF', 'SNAP', and 'School Lunch'. To the right of these is a radio button selection for 'Meets LISSDEP Income Guidelines' with 'Yes' and 'No' options. Below this is a radio button selection for 'Applicant is willing to attend safety seat training session:'. Further down is a radio button selection for 'Form Signed:'. At the bottom right is a 'Date Signed' field with a calendar icon. At the very bottom are four buttons: 'Seat Application Dashboard', 'Save', 'Delete', and 'Application Review'.

- **Relationship to Child** – Select from dropdown (required)
- **Race** - Select from dropdown (required)
- **Ethnicity** – Select from dropdown (required)
- **I or My child receives:** check all that apply, must enter eligibility number if benefit checked
- **Meets LISSDEP Income Guidelines** – Yes/No (required only if child receives none of the benefits like FAMIS, MEDICAID, WIC, etc.)
 - If no, the user is instructed to **Save** the Application.
 - When the **Save** button is clicked, the application is closed and a Not Eligible record created is (reason Income is too high)
- **Applicant is willing to attend safety seat training session** – Yes/No (required)
- **Form Signed** – Yes/No (required)
- **Date Signed** – select/ enter date as mm/dd/yyyy (required)

If **Save** button is active and clicked:

- If new application, it is saved into database
 - Additional data is automatically saved as noted above
- If existing application
 - Database application information is updated in database

If **Delete** button is active and clicked:

- A notice is displayed indicating Application/Application Review data will be deleted if you continue and the type of data involved.
- If you indicate it is Ok to delete:
 - Related Application Review is deleted
 - Application is deleted

If **Seat Application Dashboard** button is clicked

- You are returned to the **Seat Application Dashboard**

If the **Application Review** button is clicked

- You are taken to the **Application Review** page

Application Review

The **Application Review** page is used to record the outcome of the application review: the applicant is either eligible or not eligible for a safety seat.

- The **Application Review** page displays when the **Application Review** button is clicked on the **Seat Application** page.
- The **Save** and **Delete** buttons are activated for users (distribution sites) who are able to add, edit and delete Application Review data.

The top section of the **Application Review** page provides identifying information regarding the parent/guardian and the safety seat application; nothing may be changed.

Application Review

ID No.:	1028	First Name:	Samantha	Middle:	Y	Last Name:	Beecher
Birth Date:	6/17/1990	Last 4 SSN:	4309	Suffix:	0		
Distribution Site:	Atlantic Com Health Ctr	Health District:	Eastern Shore - 1	App. No.:	99		
Application Status:	Pending	Report Month:	Report Mon	Report Year:	Report Year		

- ID No., First Name, Middle, Last Name, Birthdate, Last4 SSN and Suffix** are from **Parent Guardian** record.
- Distribution Site** and **Health District** indicate which site/district initiated the seat application.
- App. No.** (Application Number) is assigned by the system as a unique identifier for the application.
- Application Status** is pending or closed, depending on the action reported in **the Application Review** page. It is pending until 1) a safety seat is issued or 2) an ineligible status is recorded at which time is automatically becomes closed.
- Report Month and Report Year indicate is the current draft tracking report on Application Review data will be reported.

When the **Application Review** page opens, you will see this message if no **Application Review** has been entered. Otherwise, the **Application Review** information will display.

Information!

Click Eligible or Non-Eligible and enter requested information. When done, click Save.

OK

Eligible Applications

- For new Application Review reporting: if the If the applicant is eligible for a safety seat, the *Eligible* section of the **Application Review** page is selected (clicked).
- For existing **Application Review** decisions, if applicant was determined to be eligible, the Eligible Information displays.

The screenshot shows the 'Eligible' section of the application review page. It includes the following fields and controls:

- Eligible** (radio button)
- Date Approved:** Date Approved (text field), [grid icon], ☐ Waiting List
- Issued Seat** (section header)
- Training Date:** Training Date (text field), [grid icon]
- Attended Training:** ☐ Yes ☐ No
- Seat Issued Date:** Seat Issued Date (text field), [grid icon]
- Type Of Seat Issued:** Select Seat Types (dropdown)
- Convertible:** ☐ Rear Facing ☐ Forward Facing
- Booster:** ☐ Use only with Lap/Shoulder harness
- Type of training received:** Select Training Types (dropdown)
- If Hands-on Training Received:**
 - Child Present:** ☐ Yes ☐ No
 - Trainee Assisted with Installation:** ☐ Yes ☐ No
 - Trainee Acknowledged they understood instructions for using seat:** ☐ Yes ☐ No
- Reason Hands-on Training not received:** Select No Hands (dropdown)
- Reason Other:** Reason Other(Specify) (text field)
- Save** (button)
- Delete** (button)

1. Click **Eligible** to select Eligible section of the page (new record only).
2. **Date Approved** – Date Application Approved (required);
3. **Waiting List** - Check if applicant put on waiting list; uncheck to remove (optional)
 - a. Distribution Site must be set to use waiting list for this to be selected.
 - b. If put on waiting list, **Save** record at this point and do not add more data.
4. **Training Date** – Date applicant scheduled for training (required)
 - a. Can **Save** record at this point without adding more information
5. **Attended Training** – Yes/No (required)
6. **Seat Issue Date** – Select/enter date parent/guardian was issued seat (required)
7. **Type of Seat Issued** – Select Convertible or Booster (required)
8. **Convertible** –select rear/front facing (required if seat type issued is convertible)
9. **Booster** – check if booster issued and true (optional)
10. **Type of Training Received** – select from dropdown (required)
11. **Hands On Training Information** – Check all that apply (active only if hands on training received)
12. **Reason Hands on Training not received** – select reason from dropdown (required if hands on training not received).
13. **Save** – When clicked, will create a new eligibility information record or update existing record.
 - a. Will also add/update seat inventory transaction if seat issued.
14. **Delete** – When clicked, will delete (remove) all eligible data (keeps application).
 - a. Will also delete seat inventory transaction if seat issued.

Not Eligible Applications

- For new Application Review reporting: if the If the applicant is not eligible for a safety seat, the *Not Eligible* section of the **Application Review** page is selected (clicked).
- For existing **Application Review** decisions, if applicant was determined to be not eligible, the *Not Eligible* Information displays.

The screenshot shows a web form titled "Not Eligible" with a radio button. Below the title, there are two rows of input fields. The first row is "Date Denied:" with a text input field containing "Date Denied" and a calendar icon. The second row is "Reason Denied:" with a dropdown menu showing "Select Reason" and a downward arrow. To the right of the dropdown is a label "Other(Specify):" followed by a text input field containing "Other(Specify)". At the bottom of the form are two buttons: "Save" and "Delete".

1. Click **Not Eligible** to activate the Not Eligible section of the page (new record only)
2. Date Denied – select/enter date application denied (required)
3. Reason Denied – select reason denied from dropdown (required)
4. **Save** - When clicked, will create a new not eligible record or update existing record.
5. **Delete** - When clicked, will delete (remove) all not eligible data (keeps application).

The screenshot shows a horizontal navigation bar with two buttons. The left button is labeled "Seat Application Dashboard" and the right button is labeled "Back to Application".

- Return to Seat **Application Dashboard** page by clicking designed button.
- Return to **Seat Application** page by clicking designated button.

Enter Monthly Inventory Transactions

In order to maintain an accurate monthly safety seat inventory, all transactions that increase or decrease inventory must be captured. Safety seats issued to parents/guardians are reported as a part of the seat application process. Other inventory transactions are reported to LISSDEP using the Seat Inventory web page. The following inventory transaction types are reported and their impact on inventory noted:

<u>Transaction Type</u>	<u>Inventory Impact</u>	<u>How Entered into LISSDEP</u>
Shipments from Vendor	+	Seat Inventory page
Returns to Vendor	-	Seat Inventory page
Transfers to another distribution site	-	Seat Inventory page
Transfers from another distribution site	+	Seat Inventory page
Lost or Stolen	-	Seat Inventory page
Used as demonstrators	-	Seat Inventory page
Damaged or “expired”	-	Seat Inventory page
Distributed (issued) to parents/guardians	-	Application Review Page
Inventory adjustments	+/-	Seat Inventory page ¹

¹ Can only be performed by VDH LISSDEP Administrator

5. Add Transaction - Click **Add New Inventory Transaction** button.
6. Edit Transaction – Click **Edit** icon beside transaction.
7. Delete Transaction – Click **Delete** icon beside transaction.
8. See below for add and edit transaction information.

Add/Edit Inventory Transaction

When the **Add New Inventory Transaction** button or the **Edit** (transaction) button is clicked, the **Seat Inventory** transaction windows opens and allow entering or editing of a transaction. When entry/editing is complete the Submit button is clicked to save the information.

The screenshot shows a web-based form titled "Seat Inventory". The form contains the following fields and controls:

- Date:** A text input field with a calendar icon to its right.
- Transaction Type:** A dropdown menu with the placeholder text "Select Transaction Type".
- Receiving Site:** A dropdown menu.
- Seat Type:** A dropdown menu with the placeholder text "Select Seat Type".
- Quantity:** A text input field with arrows on either side for incrementing/decrementing.
- Status:** A dropdown menu with the placeholder text "Select Status".
- Transfer Rec. Date:** A text input field with a calendar icon to its right.
- Comment:** A large text area for entering additional information.
- Buttons:** "Submit" and "Close" buttons are located at the bottom right of the form.

Add/Edit Inventory Transactions (Typical Transactions)

1. **Date** – select transaction date from calendar should be in current reporting month.
2. **Transaction Type** – select from dropdown list (required)
3. **Receiving Site** – see Inventory Transfer section below (required if transfer out)
4. **Seat Type** – select from dropdown list (required)
5. **Quantity** – enter value or click arrows specify count (required)
6. **Status** – automatically set depending on type of transaction
7. **Transfer Rec. Date** – See **Inventory Transfer** instructions below.
8. **Comment** – enter any text to provide additional information on transaction (optional)
9. **Submit** – Save information entered or update.
10. **Close** – close window (without saving)

Inventory Transfers (from one site to another)

1. Inventory transfers are initiated by a sending distribution site user.
2. The sending distribution site enters a transfer transaction:
 - a. **Transaction Date** – Select date of transfer from calendar or enter as mm/dd/yyyy (required)
 - b. **Transaction Type** – select Transfer Out (required)

- c. **Receiving Site** – select distribution from dropdown list (required)
 - d. **Seat Type** – select Convertible/Booster from dropdown list (required)
 - e. **Quantity** – select/enter quantity (required)
 - f. **Comment** – enter any comment related to the transaction (optional)
 - g. Click **Submit** (or Cancel to cancel action).
3. When the sending distribution site user clicks **Submit** (Step 2.g above):
 - a. A transaction for the receiving site is automatically created and will be visible to the receiving site user at the next login into LISSDEP (and going the Safety Seat Inventory Transaction page).
4. The receiving site will login to LISSDEP.
 - a. A message will display to the receiving site user that there is a pending transfer transaction they must update.
 - b. To Update, the user clicks the **Edit** icon button beside the Transfer In transaction.
 - i. The transfer transaction will display.
 - ii. The user will provide the Transfer Receipt Date for the transfer.
 - iii. The user will click **Submit**.
5. When the receiving site user clicks **Submit** (Step 4.b.iii above):
 - a. The transfer transaction will be updated for the receiving site:
 - i. The Transfer Receipt Date will be added.
 - ii. The quantity transferred will be added to the receiving site's inventory.
 - iii. The transaction status will be changed to received.
 - b. The transfer transaction will be updated for the sending site:
 - i. The Transfer Receipt Date will be added.
 - ii. The quantity transferred will be deducted from the sending site's inventory.
 - iii. The transaction status will be changed to received.
6. The inventory status of a transfer is *Pending* until the receiving site completes the inventory transaction (by entering the receipt date).
 - a. A transfer may still be pending at the end of the reporting month. This may impact end of month physical inventory balances. Sites should add a comment to the "inventory certification" noting the quantity of seats in pending status.

Backdating and Entering "future" Transactions

Because the calendar month and the reporting month do not always align (working on April's report at the beginning of May, for example) or you may have overlooked adding a transaction at the end of the previous month or you may want to post a transaction for the next reporting month. LISSDEP permits you to do the following:

1. You may enter an inventory transaction date that is up to five days less than the beginning of the reporting month. It will post to the current reporting month but have a date in the prior month.
2. You may enter a transaction date that is greater than the last day of the reporting month (but not greater than the current date). These transactions will be accepted by the LISSDEP but not applied to the tracking report month. It status will be "on hold". When you create a new tracking report (for the month in which the transaction occurred) the status will be changed from "on hold" and applied to the inventory. An example of when this is used: you are working on April's monthly report on May 5th and you receive a vendor shipment on May 5th. You could enter the shipment with a date of May 5th and it would not be applied to your inventory until you start working on May's report.

Monthly Tracking Forms

The LISSDEP monthly tracking form can be created immediately after the monthly report from the prior month has been “State Approved”. This process is described earlier in this document. Once created, a distribution site can enter application information and seat inventory transactions (also described above). The data for the monthly tracking report are calculated based on the application and seat inventory data entered.

Tracking reports submitted for prior months are also available. Data reported for prior months may not be changed.

There are multiple sections to the monthly tracking report:

- **Tracking Form Heading**
- **Inventory Summary**
- **Demographic Summary**
- **Instruction Summary**
- **Application Summary**
- **Training Classes Conducted**
- **Promotional Events**

Tracking Form Heading

This section of the tracking report shows the distribution site, health district, tracking form status tracking form moth/year. By default, the tracking form for the current reporting period displays when you click the Tracking Form tab at the top of the page. Users may change the month/year to display prior reports (you may also use the **Dashboard** tab to select the tracking report. All data on prior tracking reports may be viewed only.

For reports with Draft status, the tracking report also allow the user to enter the number of surveys mailed, add comments to the monthly report, calculate/recalculate the monthly report totals (based on detail data entered) and submit the completed monthly report.

Tracking Form

Distribution Site: Atlantic Com Health Ctr Health District: Eastern Shore - 1 Status: **Draft**

Reporting Period Month: 3 Year: 2018 Number of Exit Surveys Mailed: 0

Comments by Distribution Site:

Reviewer's Comments:

Calculate/Recalculate Form Totals Save Submit Tracking Form

Inventory Summary Demographic Summary Instruction Summary Application Summary Training Classes Promotional Events

1. **Distribution Site** – dropdown to select (if user has access to multiple sites)
2. **Health District** – display only
3. **Reporting Period Month** – dropdown to select month
4. **Reporting Period Year** – dropdown to select year
5. **Number of Exit Surveys Mailed** – user may add if tracking form status is Draft (and **Save**)
6. **Status** – status of tracking form displayed
7. **Comments by Distribution Site** – user may add any comment if status is Draft and (**Save**).
8. **Save** – Click to save Number of exit surveys mailed or Comments by distribution site.
9. **Reviewer's Comments** – Comments reviewer added after tracking form submitted.
10. **Calculate/Recalculate Form Totals** – Active if form is in Draft status. Click to calculate tracking form summary data.
11. **Submit Tracking Form** - Active if form is in Draft status. Click to submit monthly tracking form.
12. **Inventory Summary** – Click to see Inventory Summary information for month.
13. **Demographic Summary** – Click to see Demographic Summary information for month.
14. **Instruction Summary** – Click to see Instruction Summary information for month.
15. **Application Summary** – Click to see Application Summary information for month.
16. **Training Classes** – Click to view (or add if status is Draft) Training Class information for month
17. **Promotional Events** - Click to view (or add if status is Draft) Promotional Events information for month

Tracking Form – Inventory Summary

When the Inventory Summary (on the Tracking Form) is clicked, the summarized inventory data for the month is displayed.

SAFETY SEAT INVENTORY							
	On hand at beginning of month	Received from any source during month	Distributed during month	Returned to vendor, stolen or missing	Used for demonstration	Given to another site	Total number of safety seats remaining at end of month
Convertibles	18	2	3	0	1	5	11
Boosters	6	0	1	0	0	0	5
COMBINED TOTAL (OF CONVERTIBLES AND BOOSTERS ISSUED)							4

[Show Inventory Detail](#)

Note: There is no detail inventory information for reports prior to 7/1/2018

Adjustments: Convertibles

Boosters

Inventory Certification (Required)

☐ Yes ☒ No

We certify that the ending inventory above matches the actual number of safety seats of each type on hand at our distribution site at the end of the month. If there are pending seat transfers, please indicate in comment section below.

Ending Inventory Comment

[Save](#)

1. The inventory is displayed at the top of the page.
2. Show Inventory Detail – click button to display a report of all transactions for month.
3. Prior to submitting the monthly tracking form, the distribution site must certify their inventory at the end of the month.
 - a. Click **Yes** to certify your physical inventory matches this report.
 - b. Note a discrepancies (such as pending transfers, etc.) in the **Comments** box.
 - c. Click **Save**.

Show Inventory Detail (Sample)

Inventory Detail							
Transaction Date	Transaction Type	Seat Type	Quantity	Comment	TransferRecvDate	Parent Last Name	Trans Status
03/02/2018	Transfer Out	Convertible	3	Receiving site received transfer.	03/08/2018		Received
03/02/2018	Vendor Return	Booster	1	Damaged in Shipment Order # 233444			Reported
03/06/2018	Issued	Convertible	1			Hersh	Issued
03/08/2018	Shipment	Convertible	2				Received
03/13/2018	Transfer Out	Convertible	2	Receiving site received transfer.	03/16/2018		Received

Tracking Form – Demographic Summary

This section of the tracking report shows the demographic information for the seats issued.

DEMOGRAPHIC INFORMATION										
AGE										
Pregnant Parents	<1	1	2	3	4	5	6	7	8 +	Total
2	0	0	2	0	0	0	0	0	0	4
RACE										
African American	Caucasian	Asian	Native American	Biracial	Other	Not Specified	Total			
2	1	0	0	0	0	1	4			
ETHNICITY										
Hispanic	Non-Hispanic	No Specified	Total							
1	2	1	4							

[Show Demographic Detail Data](#)

Note: There is no detail inventory information for reports prior to 7/1/2018

1. Demographics are reported by Age, Race and Ethnicity.
2. Click Show **Demographic Detail Data** to see the data that were summarized.

Show Demographic Detail Data (sample)

Demographic Detail						
Parent Name	App. No.	Child Name	Child Birthdate	Child Age	Race	Ethnicity
Brown, Janie	85	[Unborn Child]	04/30/2018	Pregnant Parents	African American	Non-Hispanic
Hersh, Alice	74	Hersh, Amy	05/01/2015	2	Not Specified	No Specified
Sanchez, Malinda	86	Sanchez, Juan	02/25/2016	2	Caucasian	Hispanic
Snipe, Elenor	91	[Unborn Child]	05/01/2018	Pregnant Parents	African American	Non-Hispanic

Showing 1 to 4 of 4 entries

Previous 1 Next

[Close](#)

Tracking Form – Instruction Summary

This section of the tracking form displays a summary of the training received for seats issued.

TYPE OF INSTRUCTION PROVIDED FOR SEATS DISTRIBUTED

Number of seats issued to clients receiving Video and Class Instruction and Hands-on Installation i

3

Number of seats issued to clients receiving Video and Class Instruction i

1

Reason why hands-on installation instruction was not provided

Inclement weather 1

Other reasons 0

No vehicle of any type was available 0

Specify

Number of Participants in Classes: 9

[Show Instruction Detail](#)

[Show Training Class Detail](#)

Note: There is no detail inventory information for reports prior to 7/1/2018

Instructional Referral Information (Required)

Name of VDH approved agency serving as Safety Seat Check Station

Refer to website for up-to date listing Select

[Save](#)

1. Training totals are presented by type; reasons no hands-on training displayed.
2. **Number of Participants** in Classes displayed; based on data reported on Training Classes page.
3. **Show Instruction detail** – click to see detail data for numbers,
4. **Show Training Class Detail** – click to go to Training Classes page.
5. You must provide additional instruction information before you may “submit” a tracking form:
 - a. Name of VDH approved agency serving as a safety Seat Check Station
 - b. Refer to Website for up-to-date listing
 - c. **Save** – Click to save information entered.

Show Instruction Detail Data (sample)

Instruction Detail							
Parent Id	Parent Name	Appl.No.	Child Name	Type Of Training	Reason No Hands-On	VDH Approved Agency	Website Referral
1004	Hersh, Alice	74	Hersh, Amy	Video/Class/Hands-on	N/A		
1018	Brown, Janie	85	[Unborn Child]	Video/Class/Hands-on	N/A		
1019	Sanchez, Malinda	86	Sanchez, Juan	Video/Class/Referral	Inclement Weather		
1024	Snipe, Elenor	91	[Unborn Child]	Video/Class/Hands-on	N/A		

Showing 1 to 4 of 4 entries

Previous 1 Next

[Close](#)

Tracking Form – Application Summary

This section of the tracking form shows a summary of applications received.

SAFETY SEAT APPLICATION INFORMATION	
Number of Applications Approved (but did not show up for Training)	Number of Applications Approved (but on a Waiting List)
<input type="text" value="0"/>	<input type="text" value="1"/>
Total Number for each reason that an application was denied:	
Child already issued same type of safety seat	<input type="text" value="0"/>
Income too high	<input type="text" value="1"/>
Not the custodial parent or legal guardian	<input type="text" value="0"/>
Not a Virginia resident	<input type="text" value="4"/>
Not a resident of the distribution site	<input type="text" value="1"/>
Neither restraint meets the child's need	<input type="text" value="0"/>
Applicant marked refused training on application	<input type="text" value="0"/>
Repeatedly missed scheduled training session	<input type="text" value="0"/>
Applied before the last trimester of pregnancy	<input type="text" value="0"/>
Applied too early for a booster seat	<input type="text" value="0"/>
Acquired a seat by other means	<input type="text" value="0"/>
Client was only interested in a rear-facing-only, infant carrier	<input type="text" value="0"/>
Client no longer resides in the district or is unreachable	<input type="text" value="0"/>
Fetal death	<input type="text" value="0"/>
Visa Related	<input type="text" value="3"/>
Other reasons to denied	<input type="text" value="0"/>
Total Number of Application Denied	<input type="text" value="9"/>
Show Application Detail Data	
Note: There is no detail inventory information for reports prior to 7/1/2018	





1. Total number of applications approved but did not show up fro training
2. Number of Applications Approved but on a Waiting List
3. Total Number for each reason that an application was denied:
4. Total Number of Applications Denied
5. Show Application Detail Data

Tracking Form – Training Classes

This section of the tracking form is used to enter training class data during the reporting month and to view training class data reported.

SAFETY SEAT TRAINING CLASSES

Add New Class

Training Date	No. of Attendees	Trainers	Comments	Edit	Delete
3/23/2018	4	Team			
3/6/2018	5	Jones			

Showing 1 to 2 of 2 entries

Attendees:

Previous **1** Next

1. Training class data are displayed.
2. For current reporting month, each row may be **edited**, **deleted** or you may **Add New Class**.
3. If **Edit** or **Add New Class** clicked, this screen opens:
 - a. **Training Date** – select/enter date of class (required)
 - b. **No. of Attendees** – enter number of people who attended the class (required)
 - c. **Trainers** – Enter the trainer(s) name(s) (required)
 - d. **Comments** – Enter any comment about the class (optional)
 - e. **Submit** – Click to save data entered/updated (required if you want to save information)
 - f. **Close** - Close screen

Tracking Form – Promotional Events

This section of the tracking form is used to enter promotional events conducted during the reporting month and to view training class data reported.

PROMOTIONAL EVENT LISTING										
Add New Promotional Event										
Date	Promotional Event Name	Location of Event	Exhibit	Presentation	Non-Routine Training Session	Media (If yes, enter Media Type)	Media Type	Additional Comments	Edit	Delete
3/19/2018	WIC Class	High School	Yes	Yes	No	No				
3/8/2018	Fund Raiser	Accomack Fire Hall	Yes	Yes	No	Yes	TV, Radio, Social			

- Promotional events data are displayed.
- For current reporting month, each row may be **edited**, **deleted** or you may **Add New Promotional Event**.

Promotional event

Event Date:

Event Date

Event Name:

Event Name

Location:

Location

Exhibit:

Presentation:

NonRoutine:

Media:

Media Type:

Media Type

Comments:

Comments

Submit

Close

- If **Edit** or **Add New Class** clicked, this screen opens:
 - Event Date** – select/enter date of event (required)
 - Event Name** – enter Name of the event (required)
 - Location** – Enter location of event (required)
 - Exhibit** – select Yes/No
 - Presentation** – select Yes/No
 - Non-Routine** – select Yes/No
 - Media** – Select Yes/No
 - Media Type** – Enter media type
 - Comments** – Enter any comment about the class (optional)
 - Submit** – Click to save data entered/updated (required if you want to save information)
 - Close** - Close screen

Dashboard

The Dashboard provides a listing of all Tracking Forms for a site (or multiple sites). This list displays tracking forms by Month/Year, Health District and Site with most current month displayed at the top of the list. Fifteen entries are displayed per page.

To understand the Tracking Form Status, see [Overview of the Electronic Reporting Process](#).

The Dashboard is used for the following reasons:

1. View list of all tracking forms (for a site, district or state) and the status of each tracking form.
2. View a specific tracking form.
3. Open and edit a tracking form in **Draft** status.
4. Review and approve (district coordinator or VDH manager only) a current tracking form submitted by a distribution site.
5. Determine the current status of a tracking form and next needed action.

Here is a sample of a Dashboard:

District Select ...

Month/Year Jul 2016

Site Select ...

Status Select ...

Search
Clear

District	Site	Month/Year	Status	Status Date	Next Action
Southside	Halifax County Health Department	7/2016	LHD Approved	15 Aug 2016	State Approve
Southside	Mecklenburg County Health Department	7/2016	LHD Approved	15 Aug 2016	State Approve
Thomas Jefferson	Albemarle/Charlottesville Health Department	7/2016	Draft	15 Aug 2016	Submit
Piedmont - 1	Nottoway County Health Department	7/2016	State Approved	15 Aug 2016	Closed
Piedmont - 1	Buckingham County Health Department	7/2016	State Approved	15 Aug 2016	Closed
Piedmont - 1	Cumberland County Health Department	7/2016	Submitted	15 Aug 2016	LHD Approve
Piedmont - 1	Lunenburg County Health Department	7/2016	State Approved	15 Aug 2016	Closed

1. Multiple tracking forms are listed:
 - a. The second row (Mecklenburg County) displays a tracking form in **Draft** status.
 - i. Clicking on **Draft** (Status column) will open the tracking form for additional editing.
 - ii. Clicking Submit (**Next Action** column) will open the tracking form for submitting (by site reporter).
 - b. The sixth row (Cumberland County) displays a tracking form in a **Submitted** status;
 - i. Clicking on **LHD Approved** will open the form for reviewing/approval (by district coordinator).
 - c. The seventh row (Lunenburg County) displayed a tracking form that has successfully gone through the entire approval process. Its status is **State Approved**.
 - i. Clicking on **State Approved** or **Closed** will open the form for viewing only.

2. Dashboard Filtering

- a. You may **filter** the items that appear on the Dashboard. Filtering permits you to see only certain tracking forms; it is especially useful if you have many monthly tracking reports that span multiple pages.
- b. Five filters are available on the dashboard:
 - i. Health District
 - ii. Site
 - iii. Month
 - iv. Year
 - v. Status
- c. To utilize a filter, select an item from one or more of the filter dropdown lists and click on the **Search** button. The filtered tracking forms are displayed.
- d. Please note that you must select a health district before trying to select a site. In the sample above, filtering has been applied so only tracking reports for the month/year specified are displayed on the Dashboard.
- e. The sample above show filtering by Month and Year; only tracking reports for July, 2016 are displayed.

3. Sorting Dashboard Tracking Reports

- a. You may also order (sort) tracking reports listed on the Dashboard by clicking on any of the column headings.

To order (or change the order of tracking reports) from lowest to highest (a-z) or highest to lowest (z-a), click on the column heading multiple times – each time you click, the sort order changes for the column clicked.

Reports

Monthly Distribution Tracking Report Summary

This report shows summary data for a specific site. If the user role is district coordinator, the report may be for the coordinator's district(s). VDH managers may run report for entire state, a specific district or a specific site. Only tracking forms with a status of [State Approved](#) are included in the report data.

Note: the user role and assigned site(s)/district(s) will determine what data are available for reporting.

To run the report:

1. Specify the **Beginning Month/Year** for report (select from dropdown lists).
2. Specify the **To Month/Year** for the report (select from dropdown lists).
3. Select the **Health District** for the report (select All or the district in the dropdown list).
4. Select the **Distribution Site** for the report (leave blank or specify site).
 - a. To run by site, you must select the related Health District.
5. Click on **Generate Report**.

Monthly Inventory Detail Summary

This report provides a grid of safety seat inventory data from the monthly tracking reports. User can specify beginning month/year, ending month year, Health District and distribution site.

To run the report:

1. Click **Reports** tab.
2. Select report **Monthly Inventory Detail Summary** (from dropdown list).
3. Specify the beginning **Month/Year** for the report (select from dropdown lists).
4. Specify the ending **Month/Year** for the report (select from dropdown lists).
5. Specify the Health District (if assigned to multiple). Select from the dropdown list.
6. Specify the Distribution Site (if assigned to multiple). Select from the dropdown list.
7. Click on **Generate Report**.
8. After report displays data can be exported to Excel or PDF by clicking :



Monthly Promotional Event Summary

This report provides a grid of safety seat inventory data from the monthly tracking reports. User can specify beginning month/year, ending month year, Health District and distribution site.

To run the report:

1. Click **Reports** tab.
2. Select report **Monthly Promotional Events Summary** (from dropdown list).
3. Specify the beginning **Month/Year** for the report (select from dropdown lists).
4. Specify the ending **Month/Year** for the report (select from dropdown lists).
5. Specify the Health District (if assigned to multiple). Select from the dropdown list.
6. Specify the Distribution Site (if assigned to multiple). Select from the dropdown list.

7. Click on ***Generate Report***.
8. After report displays data can be exported to Excel or PDF by clicking:

